

Loose Papers

Pull out all scraps of paper, business cards, receipts, and miscellaneous paper. Put into your in-basket to process.

Process Your Notes

Review any “Journal/Notes” types of entries, meeting notes, and miscellaneous notes scribbled on notebook paper. Decide and enter action items, projects, waiting-for’s, etc. as appropriate.

Review Previous Calendar Data

Review past calendar in detail for remaining action items, reference data, etc. and transfer into the active system.

Review Upcoming Calendar

Review upcoming calendar events-long and short term. Capture actions triggered.

Empty Your Head

Put in writing (in appropriate categories) any new projects, action items, waiting-for’s, someday-maybe’s, etc. not yet captured.

Review Action Lists

Mark off completed actions. Review for reminders of further action steps to record.

Review Waiting-For List

Record appropriate actions for any needed follow-up. Check off received ones.

Review Project (and Larger Outcome) Lists

Evaluate status of projects, goals and outcomes, one by one, ensuring at least one current action item on each. Browse through work-in-progress support material to trigger new actions, completions, wait-ing-for’s, etc.

Review Any Relevant Checklists

Use as a trigger for any new actions.

Review Someday/Maybe List

Review for any projects which may now have become active, and transfer to “Projects.” Delete items no longer of interest.

Be Creative & Courageous

Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add into your system???